Lesson Learned: Project Documentation and Checklists

Program evaluations are complex. As the number of stakeholders—each with their own staff calendars, administrative and programmatic deadlines, and organizational styles—increases, managing logistics can become almost as time intensive as program implementation. Consistent documentation and use of checklists can improve a CBO's real-time understanding of what is happening during a program evaluation, and in retrospect, can improve understanding of what factors influenced the results of the evaluation. For community-based organizations (CBO), this is crucial to improving strategy and identifying lessons learned.

Project Documentation and Checklists – What to Track and Why?

In Fall 2019, the Office of the Assistant Secretary for Health (OASH), within the U.S. Department of Health and Human Services (HHS), sponsored a formative evaluation to assess the impact and implementation of two sexual risk avoidance (SRA) curricula aligned with the Systematic Method for Assessing Risk Avoidance Tool (SMARTool; CRE, 2019).[i] To accomplish the project, OASH engaged a number of stakeholders, including an evaluation team and two CBOs, Be Strong International (BSI) and Operation Keepsake (OK). Together, BSI and OK also partnered with 14 secondary schools in 11 school districts to deliver SMARTool-aligned SRA curricula to 9th and 10th grade students.

Given the number of stakeholders involved, there was a significant amount of information to track and exchange. Careful management of the logistical details was essential to avoid inundating or overwhelming participants.

Whether a CBO conducts an internal evaluation or partners on an independent evaluation, the organization will benefit by tracking the following suggested key elements:

Data Requests

- Track data requests to avoid redundant work. Establish a process with the evaluation team to minimize repeated requests. Establish a similar process to streamline CBO requests to schools / sites.
- Knowing the information requirements of different stakeholders in the evaluation (e.g., data collectors) and their respective deadlines can help effectively allocate staff or triage decisions for sites / schools with limited capacity.

Deadlines

- The importance of communicating and monitoring deadlines cannot be overstated because different stakeholders may have unique deadlines. The data collection team, for example, might need 2–4 weeks of lead time with final logistics (e.g., schedules and class rosters) from CBOs and sites / schools to prepare for the evaluation.

- A deep understanding of inter-related deadlines, and how much time is needed to complete each one, can help prevent risks to the project timeline. By understanding which other team deadlines are dependent on CBO activity, the CBO can better communicate with schools / sites about their respective deadlines. Deadlines can be reinforced and monitored through different communications methods, such as emails, scheduled meetings, and impromptu telephone conversations.

Bird's Eye View

- It is easy to get lost in the details, especially when the evaluation ramps up and is underway. Depending on the role, either request or provide occasional updates on the general project timeline or a "where are we now" diagram. Understanding the project status and whether timelines have shifted, for example, can help improve stakeholder's understanding of the timing of data requests and deadlines. This knowledge can help a CBO communicate changes to schools / sites. Motivate team members by helping them see how far they have come and to understand what work remains to be done.

Best Practices

In addition to what project elements to track, OASH compiled suggested best practices for CBOs to consider if they participate in a similar study or evaluation:

- **Tailor the format of tracking tools** to what works best for the project stakeholders, and the information being tracked. The best format for a "To-do list" may be a table or a calendar, for example. The best format may evolve as the project moves from one stage to the next. For example, while a highly detailed document might help planning and preparation, it may be better to simplify it to a one-page reference document to use at schools / sites.
- **Maintain records of logistics and how events unfolded in the field.** During the implementation phase, CBOs may be more focused on successfully implementing the program and may not document all project events and milestones as they happen.
While certain activities may not seem relevant to a CBO's role, (e.g., highly detailed logistics and decisions) as to the evaluation team's role, this information could provide insight into how to strengthen program implementation, highlight growth opportunities, and support study findings.
- **Understand how the collected information will be used** will provide insight on what information is critical to gather and what details are essential to remember, and is important to know if schools / sites ask for more information. Understanding how information will be used at the end of the evaluation can also support planning and preparing for possible contingencies at schools / sites.

The Evaluation Team and the CBOs used a variety of tracking tools and checklists before, during, and after the on-site portion of the program evaluation. These tools improved the evaluation team and CBOs' understanding of how the preparation and project implementation unfolded.

In addition, these tools also provided insight into strategic areas for further development for the CBOs and potential growth.

We hope these recommendations and best practices can provide insight to the field and further facilitate successful completion of sexual health education program evaluations and beyond.

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[i] The SMARTool is a technical assistance (TA) guide for use by schools, youth-serving organizations, and other agencies interested in delivering SRA education to youth.